

# Handling Duplicates in CCTO

## COVID-19 Community Team Outreach

Review the process below for avoiding duplicates when entering contacts:

### Before Entering A Contact: Search by Key Information

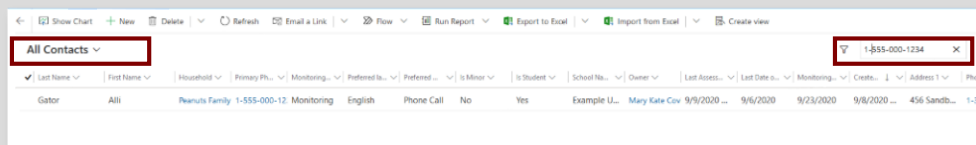
Before entering a contact, you can review whether a monitoring event already exists by searching the "All Contacts" View by key pieces of information, such as:

- Last Name (and/or First Name)
- Phone Number
- Email Address
- Mailing Address

Open each result and check for matching information. **If there is enough matching information to determine that this profile is a duplicate of an existing monitoring event**, proceed to the [Handling Multiple Exposures Job Aid](#) for next steps on updating an ongoing monitoring event or creating a new one (cloning) this contact.

### DO NOT DEACTIVATE OTHER USERS' CONTACTS:

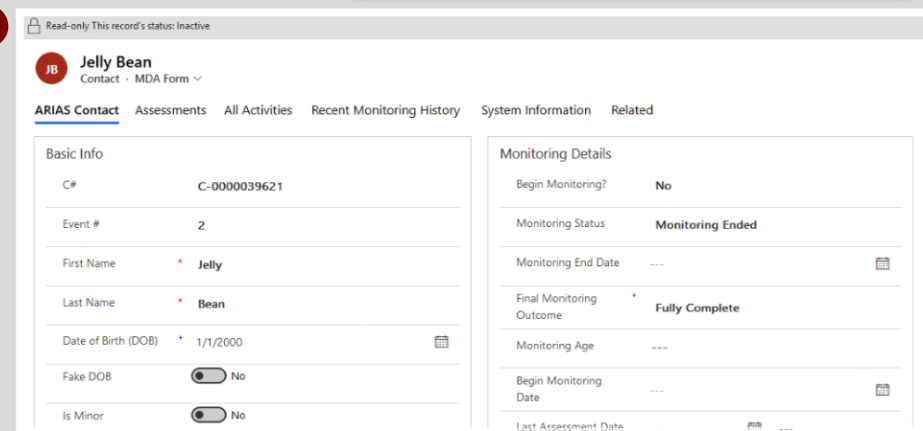
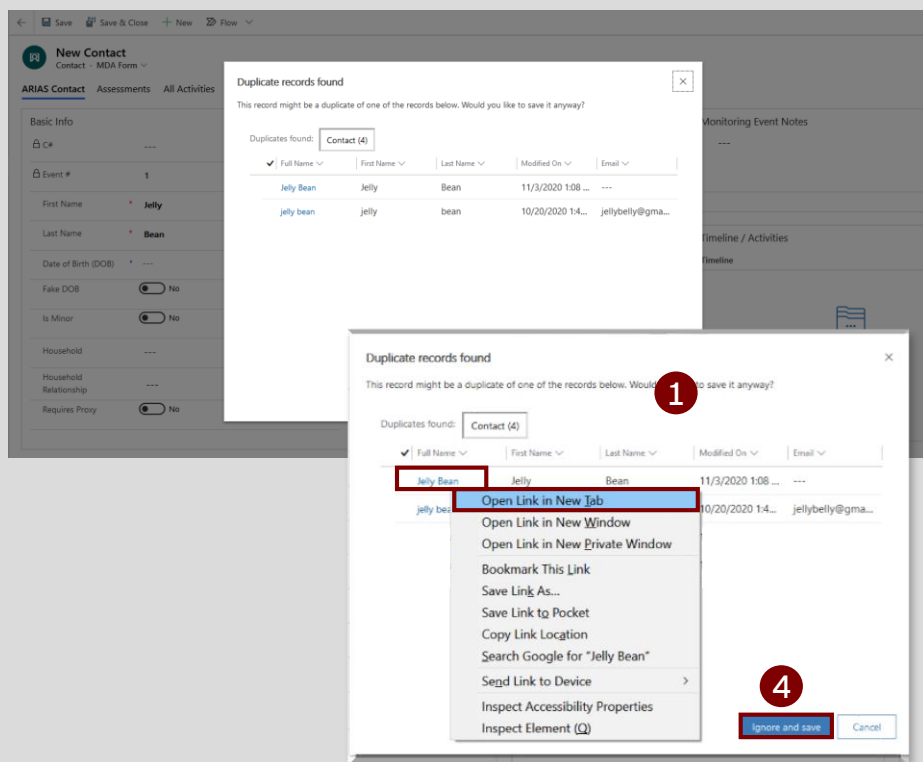
When handling duplicates, **remember that you should NEVER deactivate another user's contact**. If the contact you believe to be a duplicate is not your own, reach out to the contact's owner to determine how to proceed.



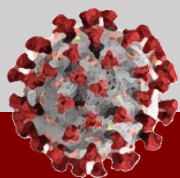
### While Entering A Contact: Duplication Warning

If you attempt to save a contact that the system has identified as a potential duplicate, you will receive a **Duplicate Record Warning**. Follow the process below:

1. **Right-click** on each linked entry and select **"Open link in new tab"** (or click the entry while holding down the CTRL or CMD key on your keyboard).
2. **Review each profile** and determine if your contact:
  - Is a duplicate of a contact who is currently being monitored in CCTO. **ACTION: Proceed to step 3 and reach out to the contact owner if needed.**
  - Is a previously-monitored contact with a deactivated profile(s). **ACTION: Proceed to step 3.**
  - Is a new individual who has never been monitored in the Tool. **ACTION: Proceed to step 4.**
3. If your contact has an existing profile (active or inactive), **DO NOT SAVE**, and follow the steps outlined in the [Handling Multiple Exposures Job Aid](#), which describes the processes for **active** contacts (p. 1) and contacts with **deactivated** profiles (p. 2).
4. If your contact is a new individual who has never been monitored in CCTO, you can click "Ignore and Save."



- 1 "Open link in new tab"
- 2 Review each profile
- 3 [Handling Multiple Exposures Job Aid](#)
- 4 "Ignore and Save"



# Handling Duplicates in CCTO

## COVID-19 Community Team Outreach

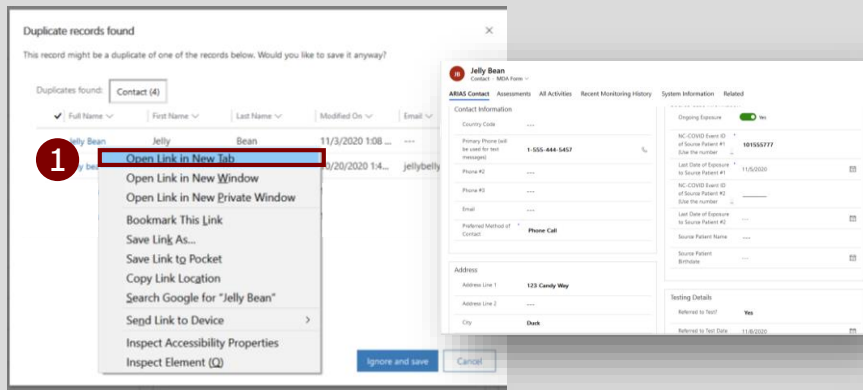
Review the process below if you come across an existing duplicate in CCTO:

### Discovering A Duplicate in CCTO

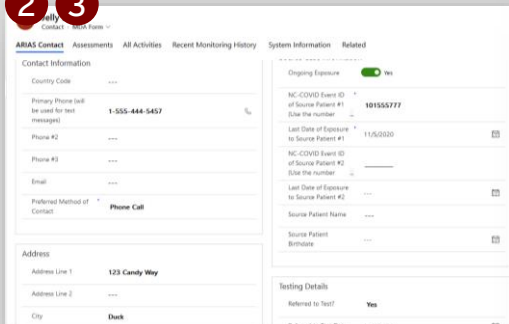
As a contact tracer, you may also come across a duplicate warning on an existing contact. If you receive a **Duplicate Record Warning** or otherwise encounter a possible duplicate, **please check with your supervisor on local protocol**. In general, you may follow the process below:

1. **Right-click** on each linked entry and select **"Open link in new tab"** (or click the entry while holding down the CTRL or CMD key on your keyboard).
2. **Review each profile** and determine if your contact:
  - Is a duplicate of an existing contact who is currently being monitored. **ACTION: Proceed to step 3.**
  - Is a previously-monitored contact with a deactivated profile under a different C#. **ACTION: DO NOT proceed to step 3. Continue to the process in the [Connecting Contacts Job Aid](#).**
  - Is not a duplicate and is a new individual who has never been monitored in the Tool. **ACTION: DO NOT proceed to step 3. Continue monitoring this individual.**
3. If your contact is a duplicate of a contact who is actively being monitored, determine which profile contains the **most complete and current information**. Review the contact's profile, **Timeline/Activities**, and **Assessments**. You may also need to reach out to the owner of the other contact to determine **how to proceed**. The most complete and current contact profile will become the profile to continue monitoring.
4. Make a note on both contact profiles indicating **all the C#s of duplicates**. This will allow for additional review of duplicate profiles.

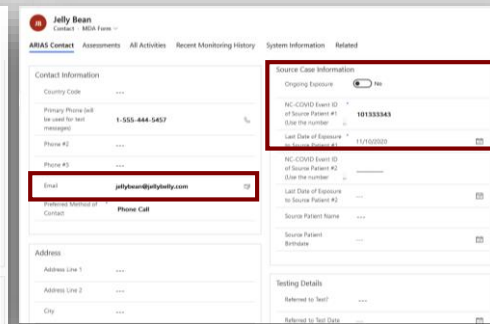
**DO NOT DEACTIVATE OTHER USERS' CONTACTS:**  
When handling duplicates, **remember that you should NEVER deactivate another user's contact**. If the contact you believe to be a duplicate is not your own, reach out to the contact's owner to determine how to proceed.



2 3

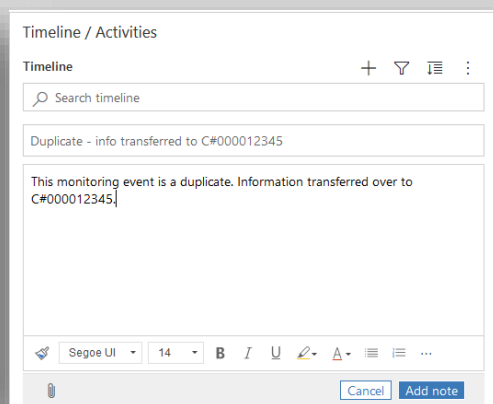
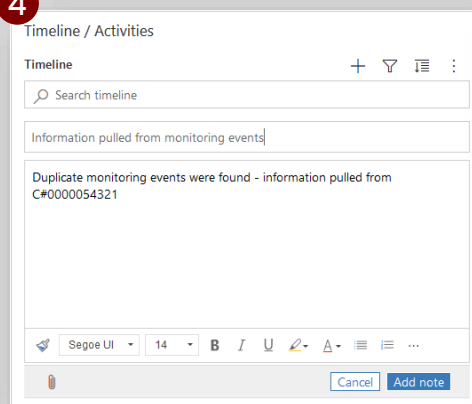


Profile to be kept



Duplicate profile (contains an email address and exposure that are missing from profile to be kept)

4



1

"Open link in new tab"

2

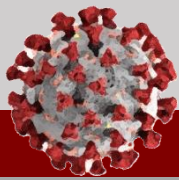
Review each profile

3

Determine profile to be kept

4

Make notes of C#s



# Handling Duplicates in CCTO

## COVID-19 Community Team Outreach

Review the process below if you come across an existing duplicate in CCTO:

- Transfer **as much information as possible** from the duplicate profile(s) onto the profile to be kept. This includes adding contact info (including NC-COVID Event #s of Source Patients), making a note of any symptoms or resource needs identified through assessments, and writing a synopsis of any key info from Timeline/Activities.

The remaining steps only apply to duplicate profiles that you believe should not be kept. Per local protocol, these profiles will be evaluated by a specific team of people to be assessed and/or deleted. You should not delete any contacts unless explicitly instructed to do so. **Remember that you should never deactivate another user's contact** and that should reach out to the other user if you believe their contact is a duplicate.

- For any duplicate profiles, **ensure that "Begin Monitoring?" is set to "No" and "Monitoring Status" is set to "Monitoring Ended."**

- Set **"Final Monitoring Outcome" on any duplicate profiles to "Is Duplicate."**

- If the duplicate profiles are your own, you may be able to deactivate them in alignment with your local protocol. If the duplicates belong to another user, contact the user and determine how best to proceed. Notify your supervisor to ensure you are following local protocol. **DO NOT delete any contact profiles.**

- Continue with monitoring as normal on the kept profile.

### DO NOT DEACTIVATE OTHER USERS' CONTACTS:

When handling duplicates, **remember that you should NEVER deactivate another user's contact.** If the contact you believe to be a duplicate is not your own, reach out to the contact's owner to determine how to proceed.

5

Duplicate Records Detected

Jelly Bean  
Contact - MDA Form

ARIAS Contact Assessments All Activities Recent Monitoring History System Information Related

Contact Information

Country Code ---

Primary Phone (will be used for text message) 1-555-444-5457

Phone #2 ---

Phone #3 ---

Email **jellybean@jellybean.com**

Preferred Method of Contact Phone Call

Address

Address Line 1 123 Candy Way

Address Line 2 ---

City Duck

Source Case Information

Ongoing Exposure ☒ Yes

NC-COVID Event ID of Source Patient #1 (Use the number) 101555777

Last Date of Exposure to Source Patient #1 11/5/2020

NC-COVID Event ID of Source Patient #2 (Use the number) **101333343**

Last Date of Exposure to Source Patient #2 11/10/2020

Source Patient Name ---

Source Patient Birthdate ---

Testing Details

Referred to Test? Yes

Transferring info onto profile to be kept

8

Save Save & Close New Clone **Deactivate** Connect Assign Email a Link Delete Refresh Process

Jelly Bean  
Contact - MDA Form

ARIAS Contact Assessments All Activities Recent Monitoring History System Information Related

Basic Info

C# C-0000040132

Event # 1

First Name Jelly

Last Name Bean

Date of Birth (DOB) 11/6/2000

Fake DOB ☐ No

Is Minor ☐ No

Household ---

Household Relationship ---

Requires Proxy ☐ No

Monitoring Details

Begin Monitoring? **No**

Monitoring Status **Monitoring Ended**

Monitoring End Date ---

Final Monitoring Outcome **Is Duplicate**

Monitoring Age ---

Begin Monitoring Date ---

Last Assessment Date ---

First Date Symptoms Reported ---

Most Recent Date Resource Need Reported ---

Contact Information

Source Case Information

Closing and deactivating duplicate profile

5 Transfer information

6 End monitoring

7 "Is Duplicate"

8 Deactivate

9 Continue monitoring